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(54) BUSINESS IMPROVEMENT SUPPORTING SYSTEM AND METHOD THEREFOR

(57) A task improvement support system and a method therefor are provided which can design an accurate strategy and, at the same time, analyze data and improve a task. In a strategy formulator, components of a task, options which each component can take, a performance index of the task, a relational expression of a combination of the options and the performance index are defined and set in a strategy database (107). A task improvement support system (100) collects knowledge

concerning the set task and prepares a strategy with a high performance index. Each strategy executor selects and executes a strategy and inputs an execution results. The task improvement support system (100) compiles execution results and analyzes a correlation of options with which an index of performance increases. As a result of the compilation and the analysis of correlation, the task improvement support system (100) accumulates information on a high priority strategy as new knowledge.

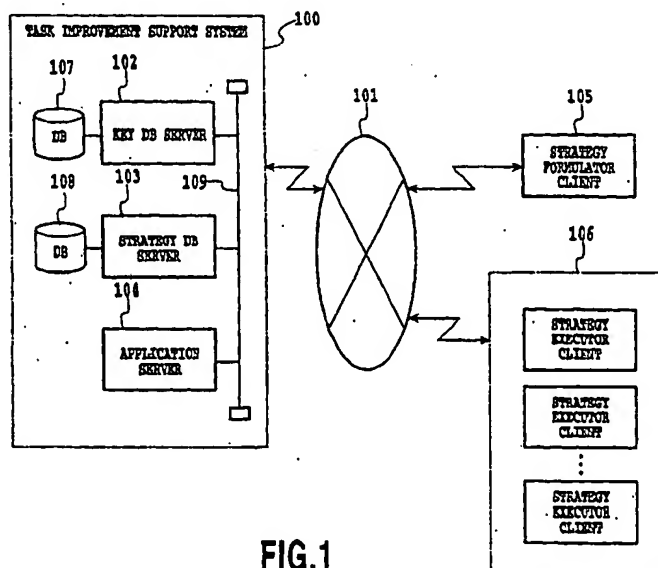


FIG.1

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[0008] Moreover, the progress management system manages a state of progress of a strategy item of an individual person but does not have a function of managing a strategy by a unit of organization or company in which items are classified into groups. In addition, the progress management does not have an organic association with the strategy formulation, the result analysis and the formulation of the next strategy. Moreover, the progress management system does not have both a function of managing progress of a policy item of an individual person and a function of retrieving strategy executors who are executing the same strategy and compare them, and cannot perform navigation (instruction) for execution of a more appropriate strategy through knowledge sharing.

[0009] In addition, a mechanism of conventional knowledge management is limited to provision of a place for introducing an implemented strategy with high performance or a place for sharing other inputted information on an information system, so-called information sharing. Further, a strategy formulator and an executor must personally retrieve information serving as a reference from a database and process the information such that the information is useful for a strategy of their own. Consequently, since labor and time are required for acquiring information useful for formulation and execution of a strategy of their own, the mechanism is not utilized so often actually.

[0010] The present invention has been devised in order to solve the above-described problems, and it is an object of the present invention to provide a task improvement support system and a method therefor which, by changing tacit knowledge of individual strategy formulators and executors into formalized knowledge to be shared in an entire company and utilizing the shared knowledge, can recommend a strategy with high performance to the individual strategy formulators and executors and manage and support execution of the recommended strategy with an ordinary information system even if there is not abundant information required for recommendation of a strategy.

[0011] In addition, it is another object of the present invention to provide a task improvement system and a method therefor which, by sharing and providing information useful for formulation of a strategy and confirmation of an execution state at any time and standardizing and automating result analysis, can organically associating formulation, implementation, and result analysis of a strategy, and formulation of the next strategy, reduce cost in the series of operations, and bring about improvement of quality.

[0012] Further, it is another object of the present invention to reduce cost in the series of operations, thereby significantly reducing time for one round of a cycle of the formulation, implementation, and result analysis of a strategy, and formulation of the next strategy, and circulating the cycle many times in a period of conventional one cycle to significantly improve a learning effect.

[0013] Moreover, it is yet another object of the present invention to provide a task improvement system and a method therefor which, by providing a knowledge collection center exceeding knowledge sharing in one company, can share only knowledge in industries of different types and industries of different categories without a capital relation among which it is difficult to share customer information, and formulate and execute a strategy with higher performance.

DISCLOSURE OF THE INVENTION

[0014] In a first aspect of the present invention, a task improvement support system in accordance with the present invention is a task improvement support system for supporting task improvement based upon execution of a strategy for a task, which includes: component storage means having stored therein a plurality of components constituting the task and options which the respective components can take; input means for inputting a plurality of strategies consisting of combinations of the options stored in the component storage means; acceptance means for accepting selection of at least one of the strategies inputted by the input means; actual measured value receiving means for receiving an actual measured value of a performance index indicating performance for the strategy for which selection is accepted by the acceptance means; and performance index calculation means for finding the performance index for the respective strategies inputted by the input means using the actual measured value of the performance index received by the actual measured value receiving means.

[0015] Here, the task improvement support system can further include: list preparation means for preparing a list, in which the strategies inputted by said input means are arranged, in accordance with the performance index found by the performance index calculation means; and list transmission means for sending the list prepared by the list preparation means.

[0016] Here, the task improvement support system can further include determination means for determining a strategy, for which execution should be recommended, among the strategies inputted by the input means based upon the performance index found by the performance index calculation means.

[0017] Here, the strategy for which execution should be recommended can be a strategy for which the performance index found by the performance index calculation means exceeds a predetermined threshold value.

[0018] Here, the task improvement support system can further include strategy preparation means for combining the options stored in the component storage means to prepare a new strategy, for which execution should be recommended, based upon the actual measured value of the performance index received by the actual measured value receiving means, in which the performance index calculation means further finds a performance index of the strategy

[0035] Here, the strategy for which execution should be recommended can be a strategy for which the found performance index exceeds a predetermined threshold value.

[0036] Here, the task improvement support method can further include combining the options stored in the component storage means to prepare a new strategy, for which execution should be recommended, based upon the received actual measured value of the received performance index, and find a performance index of the prepared strategy.

[0037] Here, the task improvement support method can further include collecting knowledge indicating a relation between the strategy and the performance index from the outside to find the performance index using the collected knowledge.

[0038] Here, the strategy for which execution should be recommended can be a strategy for which the performance index exceeds a predetermined threshold value.

[0039] Here, the task improvement support system can prepare, in preparing the strategy, the strategy for which execution should be recommended according to statistic analysis with the performance index as an explained variable and the options of the component as an explanatory variable.

[0040] Here, the task improvement support system can send, in accepting selection of the strategy, the inputted strategy and the prepared strategy to an outside information processing apparatus and accepts selection of at least one strategy which should be executed by the executor of the strategy out of the sent strategies.

[0041] Here, the task improvement support method can further include accepting change of the options constituting the prepared strategy to find a performance index of a strategy consisting of the options for which change is accepted.

[0042] Here, the task improvement support method can further include collecting knowledge indicating a relation between the strategy and the performance index from the outside to find the performance index using the collected knowledge.

[0043] Here, the task improvement support method can further include sending an actual measured value of the performance index of the received strategy in response to a request received from the outside.

[0044] Here, the task improvement support system can send, in accepting selection of the strategy, the information on the targets for whom the strategy should be executed stored in the strategy target information storage means and accepting designation of a target for whom the strategy should be executed out of the sent targets.

[0045] Here, the task improvement support method can further include: sending the inputted strategy to an outside information processing apparatus; and accepting selection of at least one strategy which the executor of the strategy should execute out of the sent strategies.

[0046] Here, the task can include any one of a sales task, a purchase task, a manufacturing task, research and development, an indirect task, general affairs, an employment task, an education task, and an investment task.

[0047] Here, the task is the sales task, and the component can include a component indicating to whom a product is sold, what kind of product is sold, and how a product is sold.

[0048] Here, the sent strategies can be received in an information processing apparatus for performing communication with the task improvement support system through a network, at least one strategy which should be executed by a strategy executor is selected out of strategies included in the received strategies in the information processing apparatus, and the selected strategy is sent to the task improvement support system in the information processing apparatus.

[0049] Here, the task improvement support method can further include sending an actual measured value of a performance index of the selected strategy from the information processing apparatus to the task improvement support system.

[0050] In a fourth aspect of the present invention, a computer readable recording medium in accordance with the present invention has recorded therein a computer program supporting task improvement based upon execution of a strategy for a task, which causes a computer to execute: a step of storing a plurality of components constituting the task and options which the respective components can take in component storage means; a step of inputting a plurality of strategies consisting of combinations of the options stored in the component storage means; a step of accepting selection of at least one of the inputted strategies; a step of receiving an actual measured value of a performance index indicating performance for the strategy for which selection is accepted; and a step of finding the performance index for the inputted strategy based upon the received actual measured value of the performance index.

BRIEF DESCRIPTION OF THE DRAWINGS

[0051]

FIG. 1 is a system diagram showing an example of a network system to which the present invention is applied; FIG. 2 is a block diagram showing a hardware configuration of a computer system which is used as a server computer in accordance with one embodiment of the present invention; FIG. 3 is a flow diagram showing procedures of a task improvement support method in accordance with one em-

BEST MODE FOR CARRYING OUT THE INVENTION

(First embodiment)

5 [0052] A first embodiment of the present invention will be described with reference to the drawings. Note that, in the following description, a term "knowledge" refers to knowledge existing inside and outside an organization obtained from experiences in the past and to knowledge utilized in all spheres such as management. More specifically, a correlation among components of a strategy, technical knowledge concerning a relation between a strategy and a performance index, know-how, and the like, which individuals have obtained through experiences or investigations on business, are included in the knowledge.

10 [0053] FIG. 1 is a diagram showing an example of a network system to which the present invention is applied. Note that a structure of the system in accordance with the present invention is represented by one shown in the basic system diagram of FIG. 1. However, this only shows an example, and the present invention is not limited to this.

15 [0054] The network system, to which the present invention is applied, is constituted by a task improvement support system 100, a strategy formulator client 105, and a strategy executor client 106. Among them, the task improvement support system 100 is constituted such that a key DB server 102, a strategy DB server 103, and an application server 104, which are connected via an LAN 109, are connected to the Internet 101 and can communicate with each other.

20 [0055] The key DB server 102 has a key database 107 storing knowledge concerning tasks and is a server computer managing this database. Customer data including an existing customer list and a potential customer list is further stored in the key database 107. For example, a person in charge of sales, a purchase item, a purchase history, and other various data are included in the customer data other than customer attributes such as name, address, telephone number, age, and sex of a customer are included in the customer data. This customer data may be inputted at the time of designing a strategy or may be inputted and stored in advance. Input of these customer data includes a form of reading and inputting data stored in an information storage medium or inputting data using a keyboard of the task improvement support system 100 other than a form of receiving data inputted in the strategy formulator client 105 or the strategy executor client 106 through the Internet 101.

25 [0056] In this way, the customer data is stored for each strategy executor, and update thereof is performed based upon data sent from each strategy executor client 106.

30 [0057] The strategy DB server 103 is a server computer which manages the strategy database 108 having stored therein a frame of components of a task (hereinafter referred to as "task components" in some cases), options which each component can take (hereinafter referred to as "factor" in some cases), an index for measuring performance of the task, and a relational expression of a combination of factors and an index of performance, and performs retrieval and extraction of the information.

35 [0058] For example, in the case in which a target task is sales of a product, components of the task can include elements described below other than a customer and the product.

(1) An element indicating based upon what kind of solicitation point a sales strategy is designed. For example, an element such as a combination of a type of effect for a customer and a price.

40 (2) An element indicating a customer and an access medium. For example, an element such as telephone, electronic mail, or the Internet.

(3) An element indicating in which period a sales strategy targeting a customer is implemented. For example, an element such as a product purchase motivation forming period or a media accessible period of the customer.

(4) An element indicating in which place a sales strategy targeting a customer is implemented. For example, an element such as a place where a customer accesses a medium, a shop, or a home of the customer.

45 [0059] Moreover, data for performance calculation for each designed strategy is stored in the key database 107. More specifically, the data may be data such as a strategy implementation unit cost on an access medium, proceeds by a unit of sales of goods or services, or a standard assumed profit before sales strategy implementation of goods or services.

50 [0060] As to a cost of a sales strategy, basic data for calculation of a cost is included such as a cost on one telephone call for one customer, a cost on one visit, a cost on printing and distribution of one brochure, or the like.

[0061] The application server 104 is a server computer comprehensively managing the entire task improvement support system 100, and collects information on a strategy or knowledge from a client computer to perform analysis or performs retrieval of the key database 107 or the strategy database 108, data recording to them, information provision to the client computer, and the like in response to a request from the client computer. The collection of information from the client computer performed by the application server 104 is performed by sending a text document written in a markup language such as HTML and displaying a Web page such as an input screen on the client computer.

55 [0062] The strategy formulator client 105 is a computer system which is used by a person who formulates a strategy

combination of factors and indexes of performance are defined. Note that details of the task components defined here will be described later.

[0076] The strategy formulator who has performed such definitions accesses the application server 104 using the strategy formulator client 105. The application server 104 sends an HTML document in response to this access. Consequently, an input screen of a strategy is displayed on the display of the strategy formulator client 105. The strategy formulator inputs the defined task, a component frame thereof, the components, the factors, the performance index, and the relational expression on this input screen. The inputted information is sent to the strategy DB server 103 via the application server 104 and recorded in the strategy database 108 (step S2).

[0077] Note that these data are revised and updated appropriately, if necessary. In addition, details of the screen displayed on the strategy formulator client 105 in step S2 will be described later using FIG. 6.

[0078] Subsequently, in step S3, the application server 104 collects knowledge concerning the combinations of options and the performance set in the strategy DB server 103 from the strategy formulator client 105. The knowledge collected here includes information system storage data, data on a paper basis, and tacit knowledge held by the strategy formulator and the strategy executor. Specifically, the knowledge indicates a strategy consisting of a specific combination of the options stored in the component storage means and a relation of this strategy with the performance index, and includes, for example, correlation data among factors, a correlation of combinations of factors and performance, and the like.

[0079] More specifically, the following is included as knowledge.

(1) Effective access methods are different by ages.

[0080] It is effective to approach customers in their thirties with an electronic mail and then from a call center.

[0081] It is effective to approach customers in their forties with a direct mail and then from a call center.

[0082] It is effective to approach customers in their fifties from a call center.

(2) Effective access methods are different by customer segment.

[0083] It is effective to approach customers corresponding to an excellent customer base with a direct mail and then from a call center.

[0084] It is effective to approach customers corresponding to an ordinary customer base from a call center.

[0085] This collected information is accumulated and stored in the key database 107 of the key DB server 102 (step S3). In collecting knowledge, the application server 104 extracts from the strategy database 108 and provides the information relating to the strategy for the task, that is, the task described above, the component frame thereof, the component, the factors, the performance index, and the relational expression in response to a request from the strategy formulator client 105. Consequently, the strategy formulator can browse the information relating to the strategy for the task.

[0086] The strategy formulator inputs the information of the knowledge concerning the strategy for the task to the strategy formulator client 105 and sends the information to the application server 104. The application server 104 instructs the key DB server 102 to record the received knowledge in the key database 107. Here, in recording the factors, the key DB server 102 may classify the factors into groups to store them according to correlation data among the collected factors or a correlation of combinations of the factors.

[0087] Note that the processing of step S3 may be performed together with the processing of step S2. In this case, when the strategy formulator sends the task, the component frame thereof, the component, the factors, the performance index, and the relational expression to the application server 104, the strategy formulator also sends knowledge for a task consisting of a combination of specific factors.

[0088] Subsequently, the strategy formulator client 105 requests the application server 104 to download data to display a high priority strategy formulation screen. The application server 104 extracts existing knowledge from the key database 107 and extracts information relating to the task from the strategy database 108. Then, the application server 104 combines factors for each task component or an aggregate of factors classified into groups to automatically prepare a strategy for the task using the extracted information. In this case, the application server 104 finds an estimated value of a performance index of a target task for the prepared strategy. This estimated value of the performance index is a priority of the prepared strategy.

[0089] The application server 104 selects a strategy with a high estimated value of the performance index from the strategies which are formulated by the strategy formulator and for which the knowledge is inputted and the automatically prepared strategy. Then, the application server 104 prepares a list (high priority strategy list) in which information on the selected strategy is arranged in accordance with an estimated value of the performance index. This high priority strategy list is stored in the strategy database 108 in the form of an HTML document and, at the same time, sent to the strategy formulator client 105 (step S4).

(3) Setting a relational expression of combinations of factors of several task components and performance of a strategy in advance and, if data of the relational expression is collected in step 55, automatically preparing a strategy consisting of a combination of factors making a performance index value high regardless of presence or absence of implementation and setting this as a recommend strategy.

Alternatively,

(4) Using a well-known technique of statistical analysis such as regression analysis with the performance index of the strategy as an explained variable and the factor of the task component as an explanatory variable to prepare a strategy consisting of a combination of factors of task components of the strategy and deciding this as a recommend strategy.

[0099] The application server 104 edits a Web page including information such as an analysis result and sends it to the strategy formulator client 105 which is instructed to perform the analysis.

[0100] Note that the analysis of an execution result of a strategy may be performed not only by a formulator of the strategy but also by an executor of the strategy.

[0101] Finally, the application server 104 accumulates the result of the compilation and the factor analysis in step S6 and the information on the high priority strategy as new knowledge to be used in the task improvement support system (step S7). Therefore, in the next execution of the task improvement support method in accordance with this embodiment, in step S4, a list of high priority strategies is prepared based upon the existing knowledge and the new knowledge accumulated in step S7.

[0102] Next, a user interface of the task improvement support method in accordance with this embodiment will be described with reference to FIGS. 4 to 13B with improvement of a sales task of a non-life insurance as an example.

[0103] FIGS. 4A and 4B illustrate an example of a frame of a task component of a task, task components and factors thereof. As shown in FIG. 4A, the task components are constituted by items "to whom", "what", and "how to sell". Options (factors) of the respective task components are shown in the right part of the figure. For example, the factors of the task component "to whom" specifies a customer segment indicating who is set as a target of a sales strategy, and include factors, for example, customer attributes such as distinction between a potential customer and an existing customer, age, and occupation, shop royalty, production preference, and the like.

[0104] In addition, as shown in FIG. 4B, the task components "what" and "how to sell" are further subdivided and, for example, the task component "what" is constituted by more detailed task components such as "product" and "added benefit". A strategy for the task can be formulated by combining these factors.

[0105] Further, a strategy for a task is formulated for each purpose of the strategy. In the example shown in the figure, purposes of a strategy include exploitation of new customers, prevention of cancellation, grade-up (up-sell) of a product purchased by a customer of a seller, and sales of a new product other than the product purchased by the customer of the seller (cross-sell). Moreover, although not shown in the figure, as a performance index in the case of a sales task of a non-life insurance, for example, an estimated profit of a sold product is defined.

[0106] FIG. 5 illustrates an example of a menu on the Web page which is displayed on the display of the strategy formulator client 105 who has accessed the task improvement support system 100 in step S1. A menu 500 includes areas 505, 506, 507, 508, and 509 which can be selected using a mouse or the like.

[0107] The area 505 is selected when a list of information on a customer (customer list) is displayed. The area 506 is selected when a high priority strategy list is displayed. The area 507 is selected when a strategy is prepared. The area 508 is selected when a business negotiation between a person in charge of sales and a customer is managed. The area 509 is selected when an execution result of a strategy is analyzed. In the case in which these areas are selected, an instruction corresponding to each area is sent to the application server 104. The application server 104 executes a CGI script or the like loaded inside thereof, thereby performing corresponding information processing and edit the next screen which should be displayed on the display of the strategy formulator client 105.

[0108] FIG. 6 illustrates an example of a screen for preparing a strategy, which is displayed on the display of the strategy formulator client 105 in the case in which the area 507 of FIG. 5 is selected by a strategy formulator. On a screen 600, there are provided a display column 605 of a target task of a strategy, an input column 606 of a purpose of a strategy, a group of a target product of a task, a name of a strategy and an implementation period of a strategy, an input column 607 of timing for implementing a strategy and an access point for a customer, an input column 608 of a type of the target product, an input column 609 of a customer segment, an input column 610 of a solicitation point of a product appealing to the customer, an input column 611 of an access method to the customer, and an input column 612 of a base to be a target of the strategy.

[0109] In an example shown in FIG. 6, the target task of a strategy is an insurance sales task of an automobile sales company. In addition, the purpose of a strategy is exploitation of new customers, the group of a target product is a non-life insurance (automobile insurance), the name is "Care", and the implementation period of a strategy is September 1 to 30, 2001. In addition, the timing for implementing a strategy is before noon on holiday, the access point to a customer is a home of the customer, and the type of a target product is a comprehensive insurance with a special

provement support system 100 contrives a recommend strategy and displays the recommend strategy in a descending order of a performance index NPV (Net Present Value) as shown in this figure.

[0120] Note that, although the example of supporting task improvement for a sales task is described in this embodiment, the present invention is also applicable to various tasks as shown in a table below. Table 1 indicates an example of tasks to which the present invention is applied, components of the tasks, and performance indexes.

[Table 1]

Task	Task Component	Performance Index
Sales Task	What kind of product is sold, to whom it is sold, when it is sold, where it is sold, which access media are combined and how the media are combined, and with what kind of message is solicited for the sales	An estimated profit of goods or services to be sold, coverage of sales (rate of coverage of target customers) and a breakdown index thereof, as well as a rate of win (rate of agreement of covered customers) and a breakdown index thereof
Purchase Task	What kind of product is purchased, from whom it is purchased, when it is purchased, in which lot unit it is purchased, and with what kind of delivery method it is purchased	Total cost including a price of main body of goods or services to be purchased as well as inventory, missing product, order, and delivery costs
Manufacturing Task	Using which material and with what kind of manufacturing process a product is manufactured	Total cost including manufacturing cost as well as product inventory and missing product costs
Research and Development	How much time is invested, who invests the time, in what kind of product the time is invested, and how the time is invested	A rate of success of new product development, business value of product
Indirect Task	What kind of service is provided, to whom (internal customers) the service is provided, and in which frequency the product is provided	Evaluation of internal customers after providing cost information for service provision, cost for each task, and a performance rate evaluated by the internal customers
General Affairs	What kind of input is laid in, from whom the input is laid in, when the input is laid in, in which lot unit the input is laid in, and what kind of cost the input is laid in; what kinds of processing is applied to the input, and in what kind of means the processing is applied; what kind of output is provided, to whom (internal customers, external customers) the output is provided, when the output is provided, in what kind of lot unit the output is provided, in what kind of cost (price) the output is provided	Cost, cycle time, quality (rate of error, customer satisfaction, etc.)
Employment Task	What kind of human resources are employed, from where the human resources are employed, through which channel the human resources are employed, and when the human resources are employed	A personal evaluation index of an employed person

data; an Internet connection unit 1510 for making connection to the Internet; and a system control unit 1501 for controlling the entire seller client.

[0133] In addition, the network system in accordance with this embodiment is provided with the task improvement support system 1 connected to the seller clients. Usually, the task improvement support system 1 is a large-scale server system or the like.

[0134] FIG. 16 shows a structure of the task improvement support system in accordance with this embodiment. The task improvement support system 1 is constituted by a reception unit 1608 for receiving data from a client computer; a transmission unit 1607 for sending data to the client computer; a retrieval unit 1603 for retrieving data on a database according to a request from the client computer; a storage unit 1606 for storing data from the client computer; a calculation unit 1604 for calculating a time in order to send time information to the client computer; an automatic dial-up unit 1611 for dialing an information processing apparatus of a user; an output unit 1605 for outputting data on the database; a display unit 1609 which is necessary for performing maintenance or the like of the server computer or the database; an input unit 1602; a system control unit 1601 for controlling the entire task improvement support system, an Internet connection unit 1610, and the like.

[0135] The task improvement support system 1 is provided with a database in which data including an existing customer list and a potential customer list of a seller are stored.

[0136] These are provided in a storage apparatus such as a database server, and the database is constructed by a relational database or the like so as to be convenient for extraction or the like of data.

[0137] In addition, as shown in FIG. 14, the task improvement support system 1 is provided with an information element accumulation unit 1-1; a sales strategy design unit 1-2 for performing design of a sales product or other sales strategies targeting a potential customer or an existing customer extracted based upon a result of data analysis; a sales process management unit 1-3 for performing data management for holding a business negotiation on the seller client side utilizing data in accordance with the designed sales strategies; a sales implementation result analysis unit 1-4; a sales strategies information saving unit 1-5, and a data analysis unit 1-6 for analyzing data.

[0138] These perform control having functions to be described later, respectively, and an application program for realizing each function performs data processing.

[0139] The task improvement support system 1 provided with the structure described above is provided with functions described below.

[0140] That is, the task improvement support system 1 performs input of basic information necessary for formulation of sales strategies with the input unit, and stores the basic information in the information element accumulation unit 1-1 in FIG. 14. In addition, the task improvement support system 1 designs a sales strategy effective for a target customer in the sales strategy design unit 1-2. Further, the task improvement support system 1 stores the designed sales strategy in the sales strategy information saving unit 1-5 and, at the same time, sends to output the sales strategy to a seller having the target customer of the strategy.

[0141] Moreover, when the seller implements the sales strategy and inputs an access result and a business negotiation result in the seller clients 3, 3' to send the results to the task improvement support system 1, the task improvement support system 1 stores the received sales strategy implementation result in the sales process management unit 1-3. Simultaneously, the task improvement support system 1 performs compilation, standard analysis, revenue and expenditure calculation, or the like of sales strategy implementation results in the sales implementation result analysis unit 1-4. Furthermore, the task improvement support system 1 automatically prepares the next sales strategy effective for a customer segment of the seller in the sales strategy design unit 1-2.

[0142] Here, sales strategies formulated in the task improvement support system 1 can be roughly classified according to sales purposes described below. Details of the processing will be described later.

(1) Acquisition of new customers. To design a sales strategy for the purpose of acquiring new customers of the seller.

(2) Continued sales including up-sell. To design a sales strategy for the purpose of continuous use of a product purchased by a customer of the seller or selling an upgrade product of the purchased product.

(3) Cross-sell. That is, to formulate a sales strategy for the purpose of selling a new product other than the product purchased by a customer of the seller.

[0143] In this specification, terms of new customer acquisition, up-sell, and cross-sell will be hereinafter used as required.

[0144] A customer database, in which data including an existing customer list, an expected customer list, and a potential customer list are stored, is provided in the task improvement support system 1. Customer data is stored for each seller in the customer database. In addition, the customer data is updated based upon data sent from each seller client. Other than customer attributes such as name, address, telephone number, age, and sex of a customer, a person in charge of sales, a purchase item, a purchase history, and other various data are included in the customer data.

1-2 selects a price (with what kind of solicitation message), an agency (using what kind of medium), less than three month before expiration date (when), and a home (where). Here, the number of targets, the number of expected agreements, and an estimated profit are selected as factors of the strategy basic data. In addition, as an estimated value of the respective factors, 100 (the number of targets), 10 (the number of expected agreements), and 10 (an estimated profit) are calculated.

[0160] Next, data input of a list of target customers to become targets of the sales strategy is performed. However, the data input may be performed at the time of sales strategy design or customer data including potential customers, expected customers, and existing customers in each seller may be inputted and stored in advance. Other than receiving and inputting data inputted in the seller clients 3, 3' through a network, input of these data includes a form of reading to input data stored in an information storage medium or performing input in the input unit 1602 of the task improvement support system 1.

[0161] FIGS. 19A to 19C are diagrams showing an example of data processing concerning correlation analysis by the sales strategy design unit 1-2. As an example, based upon the customer database 2001, processing for performing analysis of a correlation distribution of purchase results from goods/services and customer segments to display a result of the analysis is shown. Here, the sales strategy design unit 1-2 extracts a combination of a customer segment and goods or services with high possibility of sales, formulates a sales strategy for selling corresponding goods or services to expected customers of the same customer segment, and outputs a target customer list.

[0162] The sales strategy design unit 1-2 calculates a degree of consciousness of belonging to a seller based upon a trading history between a customer and the seller. Moreover, the sales strategy design unit 1-2 can combine the degree of consciousness of belonging and basic attributes of the customer such as age and address to define a customer segment with high possibility of sales.

[0163] Next, the sales strategy design unit 1-2 performs retrieval based upon the value provision factor selected in step 1 in FIG. 17 above, and extracts sales strategy data including communication factor and strategy basic data with conditions matching the selected factors out of data stored in the sales strategy information saving unit 1-5. As a result of the retrieval and the extraction, if strategies implemented in the past are extracted, the sales strategy design unit 1-2 arranges sales strategies in the past in the order from one with the highest achievement value of a selected performance index factor and prepares a list of high priority strategies.

[0164] In addition, the sales strategy design unit 1-2 can perform correction of sales strategy data and new registration of sales strategy data.

[0165] Next, an example of a simulation method of calculating an estimated profit as a result of execution of the selected strategy will be described based upon FIG. 20. First, a list of potential customers to become targets of a strategy is classified into segments using attribute investigation results of customers. Next, an estimated rate of agreement by customer segment is calculated using results such as a benchmark of other bases. According to the information, the sales strategy design unit 1-2 performs processing for calculating a rate of agreement of all strategy target customers from the estimate rate of agreement for each customer segment.

[0166] FIG. 21 is a view showing an example of a method of calculating a rate of agreement of all target customers from an estimated rate of agreement by customer segment. In the figure, a circle graph shows rates of subscribers for each type of insurance. Among them, subscribers of insurances of foreign capital companies, the Agricultural Cooperative Association/Zenrosai, which trade on low prices, insurances of places of work to which a discount by size is applied, insurance of independent agencies with high royalty for customers are less likely to cancel the insurance policies they have already taken out to purchase new insurances. Conversely, subscribers of insurances of other side job agencies, dealers, and the like are likely to cancel insurances they have already taken out to purchase new insurances. Based upon such high expectation and low expectation, the expected rate of agreement can be found according to the number of subscribers with high expectation of agreement \times 80% + the number of subscribers with low expectation of agreement \times 20%.

[0167] In addition, as the rate of agreement, based upon a best practice opportunity by purpose of strategy for each base or an average value of each base, an estimated rate of agreement in the base may be calculated.

[0168] FIG. 22 shows an example of finding a best practice opportunity from data of comparison with other companies in a predetermined period. In the figure, a vertical axis indicates each base of an automobile sales company. In addition, a horizontal axis indicates an index of performance and indicates a rate of subscription (%) for an insurance with respect to the number of sales of automobiles in each base. Here, a rate of subscription of an insurance sold by a base A is 30% and a rate of subscription of an insurance sold by a base B is 25%, and W indicates an average of rates of subscription. A best practice opportunity, that is, a highest performance index in a base X can be found from rates of subscription in other bases.

[0169] FIGS. 23A and 23B are illustrations of performance index values relating to a sales efficiency of an automobile insurance of an automobile sales company.

[0170] Moreover, the sales strategy design unit 1-2 calculates an estimated profit for one agreement from cost for one agreement unit price and strategy implementation (agreement unit price and strategy implementation cost) and

an instruction of work in the next process to the respective seller clients 3, 3' and outputting, as a list, a development state for each individual customer and each sales strategy for allowing a supervisor to perform progress management of sales strategies.

[0183] In FIG. 27, as an example of this embodiment, target customers are apportioned according to a base based upon implementation planned strategies and a target customer list (S3901). In each base, a salesperson who is capable of working on a date of strategy implementation, and time information is fed back to the task improvement support system 1 from the seller clients 3, 3' via a network 2. The strategy formulator compiles the result and outputs a date of implementation of work and a list of persons in charge of work which are finally decided (S3902).

[0184] FIG. 28 shows a flow of processing in the case in which a head office of an automobile sales company formulates a recommended sales strategy and employees of each sales company select the formulated strategy. In the example shown in the figure, a call center refers to selection results of all the sales companies to examine a date when implementation of outbound call is possible. The head office prepares a schedule of the outbound call and follow-up based upon a result of examination in the call center and a result of examination of a date when follow-up to customers is possible after execution of the strategy in the automobile sales companies.

[0185] In addition, the task improvement support system 1 performs processing for automatically extracting customers who can be approached again, processing for automatically retrieving a point for which solicitation of a strategy is insufficient with respect to customer attributes recognized by the system, and processing for outputting a sales promotion method corresponding with each customer based on the final access result stage, customer attributes, and information obtained in sales activity for customers who have not passed through each stage. FIG. 29 shows an example of processing of this embodiment. A strategy having a next highest estimated value of performance index is automatically apportioned to expected customers who rejected the sales strategy at the time of message communication as a result of implementation of the sales strategy, and is implemented.

[0186] The sales strategy design unit 1-2 performs result analysis based upon the business negotiation result, which was inputted in the seller clients 3, 3' and sent to the task improvement support system 1, and automatically recommends a sales strategy which should be taken next (steps 3, 4 in FIG. 17).

[0187] The task improvement support system 1 performs processing for classifying sales strategies into groups which are defined from target goods or services and processing for classifying each sales strategy in each group for each customer segment as required. Subsequently, the task improvement support system 1 performs processing for evaluating and scoring performance of respective components of value provision factors and communication factors in each group or subgroup or combinations thereof in a relation with sales strategy implementation stages such as the reach customer, the message communication successful customer, and the customer who is capable of moving to the next access.

[0188] Subsequently, the task improvement support system 1 performs processing for extracting a sales strategy which has exceeded a threshold of a performance index set by a user as a candidate of the next and subsequent sales strategies based upon a combination of a value provision factor and a communication factor having a highest score (analysis target value) in the group or subgroup and an estimated cost and an estimated profit in the calculated sales strategy implementation.

[0189] In addition, in the case in which a sales strategy extracted by the business negotiation result analysis function provided in the task improvement support system 1 is registered in a storage device and a new strategy according to a combination of other purpose of strategy and strategy factor is inputted from the input unit 1602, the task improvement support system 1 prepares a sales strategy portfolio which is expected to have a highest performance index value within a limitation of parameters of the seller expected customers and existing customers.

[0190] In addition, the task improvement support system 1 updates data accumulated in the sales strategy information saving unit 1-5 based upon a result of a business negotiation and, at the same time, makes it possible to extract sales strategy design information which was most effective in each customer segment according to a purpose of strategy and goods/services at the time of design of a new sales strategy. Consequently, a profitability of a sales strategy can be increased every time the number of times of sales strategy implementation is increased. FIGS. 18A to 18C shows a flow of the processing of this embodiment.

[0191] In FIGS. 18A to 18C, formulation of a sales strategy is performed in step 1, and the seller performs execution of the strategy while confirming a business negotiation state in step 2. An execution result of the strategy performed in this way is analyzed in step 3, and a combination of factors of the implemented strategy is accumulated as knowledge together with a performance index in step 4. Moreover, strategies performed in the past are arranged based upon performance indexes to recommend a strategy exceeding the threshold.

[0192] The task improvement support system 1 accumulates a sales strategy implement result in the sales strategy information saving unit 1-5 based upon a result of the business negotiation. The sales strategy design unit 1-2 learns most effective sales strategy design in each customer segment based upon the stored implementation results.

[0193] In the present invention, data indicating a result of implementing a sales strategy is accumulated as shown in FIGS. 18A to 18C, and feedback to the next and subsequent marketing strategies is performed. Through repeating

(3) Communication factors

1. Solicitation message (what kind of message)

[0202] A low price, high compensation with a reasonable price, after care, and the like.

2. Medium (with which access medium)

[0203] Telephone, a direct mail, an electronic mail, a person, and the like.

3. When

[0204]

• Automobile insurance purchase motivation forming time

One month, two months, or three months before an expiration date of a present agreement, during business negotiation for purchase of a new car, and the like.

• Media accessible time of a customer

Data of days of week, time slot, and the like.

4. Where

[0205] A home, a place of work, a pertinent automobile sales shop, and the like.

(4) Strategy basic data

[0206] Performance indexes such as a strategy NPV, a reach rate, an effective conversation rate, a rate of agreement, and media cost per one reach, basic data such as an average estimated unit price by product, a sales strategy cost unit price, and an insurance sales agency fee for calculation of a performance index value.

[0207] Subsequently, automobile sales, service, accident car storage databases of each base of an automobile sales company and an automobile insurance sales support ASP are connected by a network to establish a data mart. Here, in the case in which a seller has a plurality of shops, sales achievements of respective bases are compared according to an index such as a contract rate or a continuation rate to calculate a best practice opportunity by each purpose of strategy. An estimated profit by strategy is calculated based upon a result of the calculation to determine a high priority purpose of strategy.

[0208] In addition, an expected rate of agreement and an estimated profit can be calculated by performing weighting for each customer segment according to a purpose of strategy.

[0209] For example, in a strategy for selling an automobile insurance to a customer who has taken out an automobile insurance policy but has not purchased an automobile insurance through the pertinent automobile sales company, a rate of agreement is low for a customer segment of customers who have entered into automobile insurance agreements with other agencies due to a reason such as relationship and is high for a customer segment of customers who have entered into automobile insurance agreements with other automobile sales shops and left the agreements as they are. This estimated rate of agreement is calculated using questionnaire investigation, focus interview, and data of the past.

[0210] In the case in which there is sales strategy data of the past, strategy data and a performance index achievement value of the past are inputted in a sales strategy frame consisting of purposes of strategies, value provision factors, and communication factors. As to the communication factors, access media to customers are arranged in time series and a plurality of accesses from a first access are registered. In the case in which the sales strategies in the past are implemented by the system in accordance with this embodiment, the strategy data and the performance index achievement value are automatically displayed on a table consisting of the purposes of strategies, the value provision factors, and the communication factors.

[0211] In order to calculate this estimated profit, the task improvement support system 1 has to store sales achievements of the past and performance index value factors and basic data for calculation of a budget value as the strategy basic data described above. An estimated value of a performance index such as an NPV is calculated from basic data such as average unit price of automobile insurance products, an insurance agency fee of an automobile sales company, a sales strategy cost (direct mail unit price, telephone unit price, personnel expense unit price, etc.) and an estimated value of a rate of agreement, a rate of message communication success, or a reach rate.

[0212] In addition, in the case in which sales strategy data of the past does not exist in a form conforming to the sales strategy frame, information on correlation analysis of a part of factors of the sales strategy frame is given. For

(3) Communication factors

<First access>

5 [0223]

Solicitation message (what kind of message): Low price

Medium (with which access medium): Telephone

10 When: Access potential customers within two months from dates of expiration of present agreements (customers for whom expiration dates are unclear are also targets) in the weekend

Where: Home

<Second access>

15 [0224]

Solicitation message (what kind of message): After care

Medium (with which access medium): Person in charge of automobile insurance sales

20 When: Access potential customers within two months from dates of expiration of present agreements (customers for whom expiration dates are unclear are also targets) from ten to sixteen o'clock on weekdays

Where: Home

Step 2: Implementation of a strategy

25 [0225] In the case in which the access medium of the first access is telephone, a person in charge making a telephone call has a conversation with customers, who the person in charge could have reached, based upon the sales strategy in accordance with a script prepared in advance. Thereafter, the person in charge inputs contents of the telephone conversation, whether or not message communication was possible, and a degree of expectation of shift to the second access or agreement in the seller clients 3, 3'. The inputted data is accumulated in the task improvement support system via a network.

30 [0226] Information on customers with a high degree of expectation of shift to the second access or agreement is automatically communicated to the person in charge of automobile insurance sales from the seller clients 3, 3' from the task improvement support system 1 via the network 2. The person in charge of automobile insurance sales makes a phone call to potential customers based upon the information and makes appointments for date and time of visit.

35 [0227] As data indicating a sales strategy which should be taken at the time of visit, customer information and a way of sales are sent from the task improvement support system 1, and the person in charge performs sales of the automobile insurance with reference to the information. Thereafter, the person in charge inputs contents of the telephone conversation, whether or not message communication was possible, and a degree of expectation of shift to the third access or agreement in the seller clients 3, 3'.

40 [0228] The inputted data is accumulated in the task improvement support system 1 via a network. The shift to the third access is not recorded in this embodiment. However, customers with whom the sales strategy has resulted in agreement within a predetermined period after the start of the second access among the target customers are recorded as results of the sales strategy.

45 [0229] Sales support media which are handed to the target customers in forms of media of electronics, mail, and hand delivery and a script in the case in which a human is an access medium are arranged into a template reflecting results of sales strategies of the past. At the time of determination of a sales strategy, a fittest template is automatically selected. The person in charge asks customers predetermined questions during implementation of the sales strategy and reflects results of the questions on the template, whereby contents of the template can be customized. For example, the person in charge asks present conditions of agreement with other companies, and contents recommending an automobile insurance with special agreement for personal injury and vehicle are reflected on the template for customers with SAP agreements of sixteenth or higher grades.

50 [0230] Subsequently, a state of passage of the sales strategy through the first access and the second access, a state of agreement, and attribute information of those who has passed or has not passed each access are sent to seller clients of a strategy formulator, a person in charge of telephone in the first access and a person in charge of automobile insurance sales in the second access from the task improvement support system 1 everyday.

55 [0231] The strategy formulator performs revision of the scripts of the first access and the second access and a sales method based upon the information and gives an instruction to each person in charge of access through the task improvement support system 1. The person in charge of telephone in the first access and the person in charge of

ed without a high degree of skill.

- A strategy is formulated according to selection of factors of task components, whereby strategy formulation, analysis, and the like become easy, and it becomes possible for an employee of a level of a person in charge of a task to independently circulate the cycle of strategy formulation/execution, result analysis, and feedback to the next strategy.
- The cycle of strategy formulation/execution, result analysis, and feedback to the next strategy is supported by an information system, whereby cost for circulating the cycle is reduced, time for information collection and analysis is shortened, the number of cycles which can be circulated in a predetermined period is increased remarkably, and a learning effect is improved.
- Since a plurality of strategy formulators and strategy executors change implementation results of colleagues selected at random all over the country into knowledge with specific information such as individual names hidden and share the knowledge instantly not through a hierarchy of an organization, contrivance can be made in formulating a new strategy and executing of the strategy.
- According to definitions of a strategy component and a performance index, a strategy expected to have a higher effect can be automatically generated to navigate (instruct) a strategy executor without the strategy executor retrieving knowledge.
- By providing a knowledge database in an external integrated center, knowledge of other companies and channels without a capital relation can be put together without requesting disclosure of information peculiar to companies.

<Reduction of cost>

[0241]

- Cost on information collection, analysis, and discussion necessary for formulation of a strategy can be reduced, and time therefor can be shortened. As a result, frequency and quality of strategy formulation or the like can be increased.
- In addition, cost on information collection for confirming an execution state of a strategy, confirmation of progress, and provision of an advice can be reduced, and time therefor can be shortened. As a result, frequency and quality of the advice can be increased.
- In addition, by standardization and automation of result analysis, cost on the result analysis can be reduced, and time therefor can be shortened. As a result, frequency and quality of the result analysis can be increased.
- Further, based upon execution results of strategies in the past, cost and time required for information collection, analysis, and discussion for examining a strategy with higher performance can be reduced. As a result, frequency and quality of examining the strategy with higher performance can be increased.

Claims

1. A task improvement support system for supporting task improvement based upon execution of a strategy for a task, **characterized by** comprising:

component storage means having stored therein a plurality of components constituting the task and options which the respective components can take;

input means for inputting a plurality of strategies consisting of combinations of the options stored in said component storage means;

acceptance means for accepting selection of at least one of the strategies inputted by said input means;

actual measured value receiving means for receiving an actual measured value of a performance index indicating performance for the strategy for which selection is accepted by said acceptance means; and

performance index calculation means for finding the performance index for the respective strategies inputted by said input means using the actual measured value of the performance index received by said actual measured value receiving means.

2. The task improvement support system according to claim 1, **characterized by** further comprising:

list preparation means for preparing a list, in which the strategies inputted by said input means are arranged, in accordance with the performance index found by said performance index calculation means; and

list transmission means for sending the list prepared by said list preparation means.

14. The task improvement support system according to claim 1, **characterized in that** said acceptance means comprises:

strategy transmission means for sending the strategy inputted by said input means to an outside information processing apparatus; and
strategy acceptance means for accepting selection of at least one strategy which the executor of the strategy should execute out of the strategies sent by said strategy transmission means.

15. The task improvement support system according to claim 1, **characterized in that** the task includes any one of a sales task, a purchase task, a manufacturing task, research and development, an indirect task, general affairs, an employment task, an education task, and an investment task.

16. The task improvement support system according to claim 1, **characterized in that** the task is the sales task, and the component includes a component indicating to whom a product is sold, what kind of product is sold, and how a product is sold.

17. An information processing apparatus for performing communication with said task improvement support system according to claim 9 through a network, comprising:

means for receiving strategies sent by said strategy transmission means;
means for selecting at least one strategy which should be executed by a strategy executor out of strategies included in the strategies received by said receiving means; and
means for sending the strategy selected by said selecting means to said strategy acceptance means.

18. The information processing apparatus according to claim 17, **characterized by** further comprising means for sending an actual measured value of a performance index of the strategy selected by said selecting means to said task support system.

19. A task improvement support method using a system for supporting task improvement based upon execution of a strategy for a task, comprising:

storing a plurality of components constituting the task and options which the respective components can take in component storage means;
inputting a plurality of strategies consisting of combinations of the options stored in said component storage means;
accepting selection of at least one of the inputted strategies;
receiving an actual measured value of a performance index indicating performance for the strategy for which selection is accepted; and
finding the performance index for the inputted strategies based upon the received actual measured value of the performance index.

20. The task improvement support method according to claim 19, **characterized by** comprising:

preparing a list, in which the inputted strategies are arranged, in accordance with the found performance index; and
sending the prepared list.

21. The task improvement support method according to claim 19, **characterized by** further comprising determining a strategy for which execution should be recommended out of the inputted strategies based upon the found performance index.

22. The task improvement support method according to claim 21, **characterized in that** the strategy for which execution should be recommended can be a strategy for which the found performance index exceeds a predetermined threshold value.

23. The task improvement support method according to claim 19, **characterized by** further comprising combining the options stored in said component storage means to prepare a new strategy, for which execution should be recommended, based upon the received actual measured value of the performance index, and find a performance index

37. A computer readable recording medium, **characterized by** having recorded therein a computer program supporting task improvement based upon execution of a strategy for a task, the computer program causing the computer to execute:

- 5 a step of storing a plurality of components constituting the task and options which the respective components can take in component storage means;
- a step of inputting a plurality of strategies consisting of combinations of the options stored in said component storage means;
- a step of accepting selection of at least one of the inputted strategies;
- 10 a step of receiving an actual measured value of a performance index indicating performance for the strategy for which selection is accepted; and
- a step of finding the performance index for the inputted strategy based upon the received actual measured value of the performance index.

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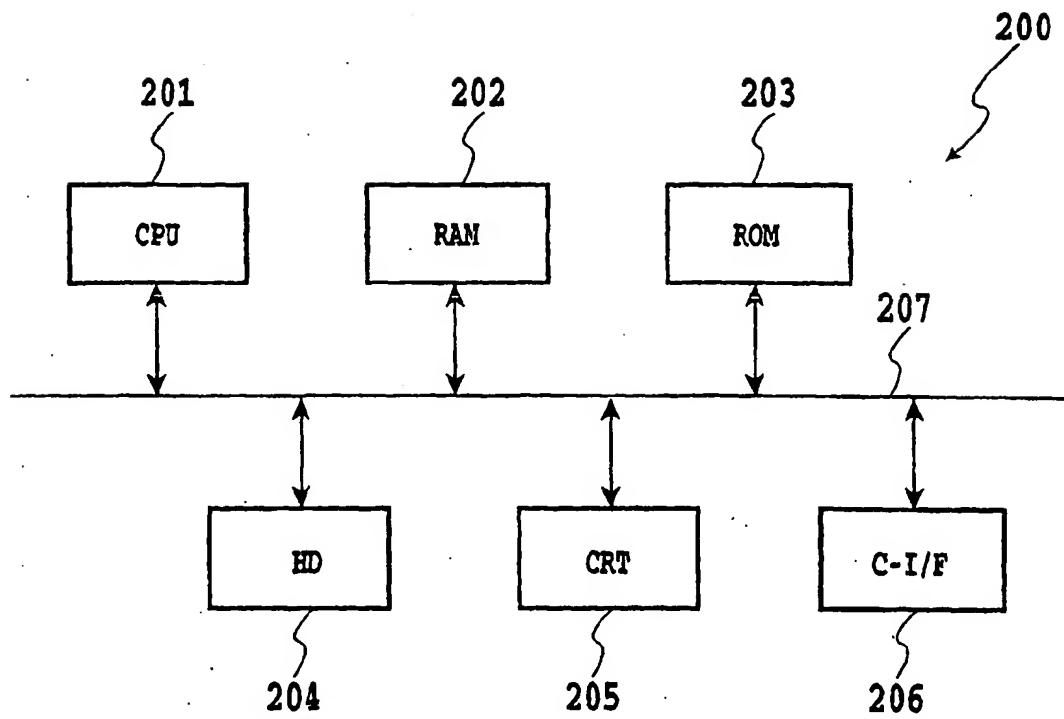


FIG.2

TASK COMPONENT		FACTOR
TO WHOM		<ul style="list-style-type: none"> POTENTIAL/EXISTING CUSTOMERS AGE, OCCUPATION SINGLE/MARRIED SHOP ROYALTY PREFERENCE OF PRODUCT
WHAT	PRODUCT	<ul style="list-style-type: none"> AUTOMOBILE INSURANCE <ul style="list-style-type: none"> WITH SPECIAL AGREEMENT FOR PERSONAL INJURY SAP PAP BAP ACCIDENT FIRE THIRD FIELD
	ADDED BENEFIT	<ul style="list-style-type: none"> LIFE PLANNING/FINANCIAL PLANNING WELFARE PROGRAM SERVICE ROAD SERVICE POINT SERVICE
HOW TO SELL	COMBINATION OF ACCESS MEDIUM AND TYPE	<ul style="list-style-type: none"> AGENCY <ul style="list-style-type: none"> INDEPENDENT AGENCY CORPORATE AGENCY DEALER AUTO FINANCIAL SPECIAL TEAM SALES PERSONNEL CALL CENTER INTERNET HP MAIL MAGAZINE E MAIL DIRECT MAIL
	WHEN	<ul style="list-style-type: none"> X MONTH(S) BEFORE EXPIRATION DATE AT THE TIME WHEN CHANGE OF CONTENTS OF AGREEMENT IS RECEIVED OR WITHIN X DAYS OF THE RECEPTION AT THE TIME OF LIFE EVENT <ul style="list-style-type: none"> PURCHASE OF AUTOMOBILE PURCHASE OF HOUSE
	WHERE	<ul style="list-style-type: none"> PLACE OF WORK HOME PARENTS' HOME COMMUNITY MAIL ADDRESS
	WHAT KIND OF MESSAGE IS APPEALED TO CUSTOMERS	<ul style="list-style-type: none"> PRICE <ul style="list-style-type: none"> REDUCED WITH SAME COMPENSATION POSSIBILITY OF REDUCTION OF PRICE ACCORDING TO REEXAMINATION OF CONTENTS OF COMPENSATION OTHERS ADDED BENEFIT <ul style="list-style-type: none"> NEW ROAD SERVICE CONTENTS OF UNPRECEDENTED COMPENSATION

FIG.4A

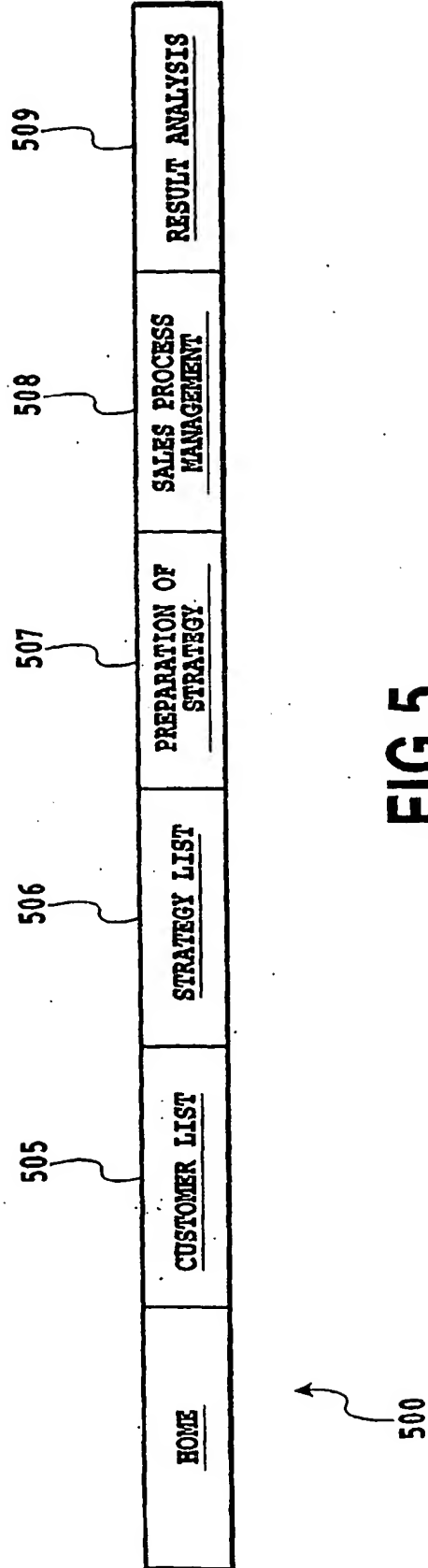


FIG.5

HOME	CUSTOMER & AGREEMENT	PRESENT STATE ANALYSIS	CUSTOMER LIST	ITEM LIST	STRATEGY LIST
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LIST OF STRATEGY

RETRIEVAL

DOWNLOAD

COPY

DESIGN CHANG

APPROVAL

END

PURPOSE OF STRATEGY

CONDITIONS OF RETRIEVAL

ACQUISITION OF NEW CUSTOMERS

PRODUCT GROUP

STRATEGY NO.

○

NAME OF STRATEGY

IMPLEMENTATION PERIOD

STATUS

AAA	2001/04/01-2001/04/10	COMPLETION
BBB	2001/06/08-2001/06/22	WAIT FOR IMPLEMENTATION
CCC	2001/06/15-2001/06/28	TARGET BEING DECIDED
DDD	2001/07/01-2001/08/01	TARGET BEING DECIDED
EEE	2001/05/01-2001/05/15	BEING IMPLEMENTED
FFF	2001/05/01-2001/05/15	BEING IMPLEMENTED
GGG	2001/08/01-2001/09/01	TARGET BEING DECIDED

701

702

703

FIG.7

HOME	CUSTOMER & AGREEMENT	PRESENT STATE ANALYSIS	CUSTOMER LIST	SALES PROCESS MANAGEMENT	STRATEGY LIST
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LIST OF STRATEGY

PLAN FOR "A" BRANCH OFFICE	STRATEGY NO.: 00005492	UPDATED: 2001/05/14
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PURPOSE	ACQUISITION OF NEW CUSTOMERS	PRODUCT GROUP	NON-LIFE INSURANCE: AUTOMOBILE INSURANCE
NAME	"A" BRANCH OFFICE: AUTOMOBILE INSURANCE BUSINESS STRATEGY		
PERIOD	2001/06/15~2001/07/15	PLANNED DATE OF COMPLETION OF FOLLOW-UP	2001/08/21
TIMING	SIX MONTH BEFORE INSURANCE EXPIRATION DATE	ACCESS POINT	HOME
PRODUCT	0001 COMPREHENSIVE INSURANCE		
SOLICITATION POINT	PRICE: LOW PRICE WITH THE SAME COMPENSATION	ACCESS METHOD	CALL CENTER-NON-LIFE INSURANCE AGENCY
STATUS	TARGET BEING DECIDED		

SELECTED FROM TARGET OF STRATEGY YES YES NO	CUSTOMER #	NAME	NAME (KATAKANA CHARACTER)	ADDRESS	TELEPHONE NUMBER	SEX	AGE	TYPE OF CAR	CUSTOMER RAT
<input checked="" type="checkbox"/>	00000328	000000	000000	42-3,0003CHOME,000KU, TOKYO	3781128820	FEMALE	33	000 1000 3	E
<input checked="" type="checkbox"/>	00000334	000000	000000	44-3,0004CHOME,000KU, TOKYO	7297722820	MALE	31	000 2000 5	D
<input checked="" type="checkbox"/>	00000335	000000	000000	10-4,0004CHOME,000KU, TOKYO	8338722820	FEMALE	38	000 1000 3	D
<input checked="" type="checkbox"/>	00000336	000000	000000	15-5,0004CHOME,000KU, TOKYO	7289722820	FEMALE	39	000 150 0	C
<input checked="" type="checkbox"/>	00000340	000000	000000	15-4,0004CHOME,000KU, TOKYO	1080282820	MALE	39	000 270 0	B
<input checked="" type="checkbox"/>	00000347	000000	000000	37-4,0003CHOME,000KU, TOKYO	7373856820	MALE	36	000 25 0	C

801

FIG.9

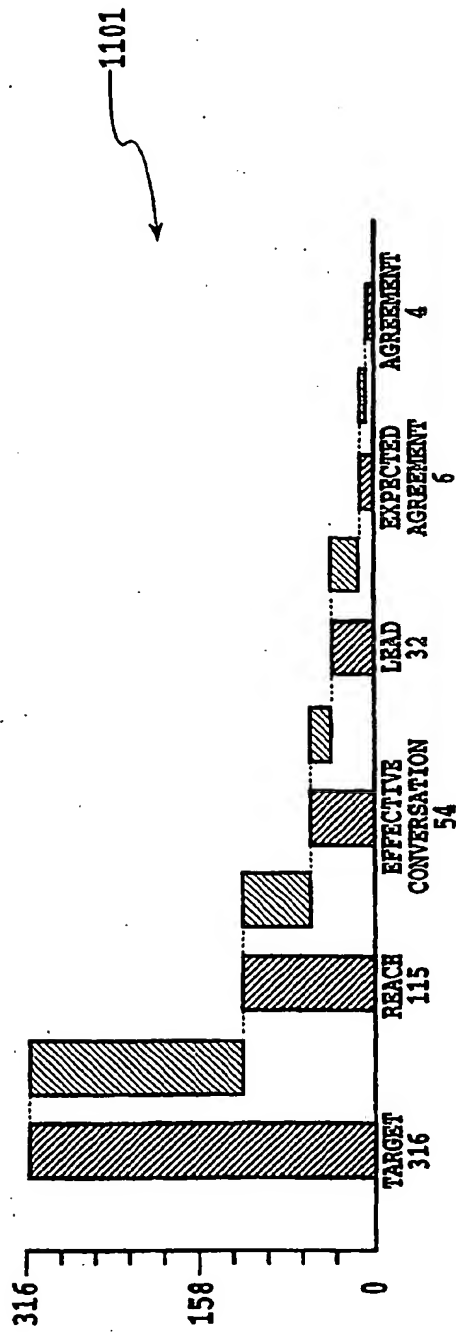
802

COMPLETION
OF CHECK

SAVE

HOME	CUSTOMER LIST	STRATEGY LIST	PREPARATION OF STRATEGY	SALES PROCESS MANAGEMENT	RESULT ANALYSIS	LOGOFF
No : 00005516 RAINY SEASON 05						

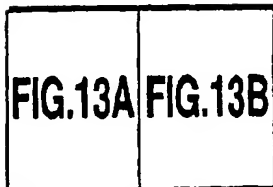
RETRIEVAL



KPI	NUMERATOR GATE Gate	DENOMINATOR GATE Gate	VALUE
RATE OF AGREEMENT	AGREEMENT	TARGET	1.26
RATE OF REACH	REACH	TARGET	36.39
RATE OF EFFECTIVE CONVERSATION	EFFECTIVE CONVERSATION	REACH	46.96
RATE OF LEAD-1	LEAD	EFFECTIVE CONVERSATION	59.25
RATE OF LEAD-2	LEAD	TARGET	10.12
RATE OF CHANGE INTO AGREEMENT	AGREEMENT	REACH	12.50

FIG.11

FIG.13



HOME	CUSTOMER LIST	STRATEGY LIST	PREPARATION OF STRATEGY	SALES PROCESS MANAGEMENT	RESULT ANALYSIS	LOGOFF
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PREPARATION OF STRATEGY

COPY

IMPLEMENTATION PERIOD	PRODUCT GROUP	PURPOSE OF STRATEGY
STANDARD	NON-LIFE INSURANCE; AUTOMOBILE INSURANCE	ACQUISITION OF NEW CUSTOMERS

PRODUCT	BEST	POINT	BEST
TIMING	BEST	ACCESS METHOD	BEST

RATE OF CLOSING	PERIOD	INTEREST RATE	RATE OF CONTINUATION OF INSURANCE POLICY
50.00 %	3 YEARS	1.00 %	90.00 %

1301

SECTION	SEGMENT GROUP	NUMBER OF TARGETS	INSURANCE PRICE	UNIT PRICE OF COST	AGREEMENT OF RESERVATION		ESTIMATED PROFIT	NPV
<input type="radio"/>	EXCELLENT CUSTOMER BASE	320	50000 YEN	400 YEN	7.81 %	24	1072000 YEN	3094154 YEN
<input type="radio"/>	THIRTIES	49	50000 YEN	400 YEN	8.92 %	4	180400 YEN	517425 YEN
<input type="radio"/>	FIFTIES	85	50000 YEN	250 YEN	1.16 %	0	-21250 YEN	-21250 YEN

FIG.13A

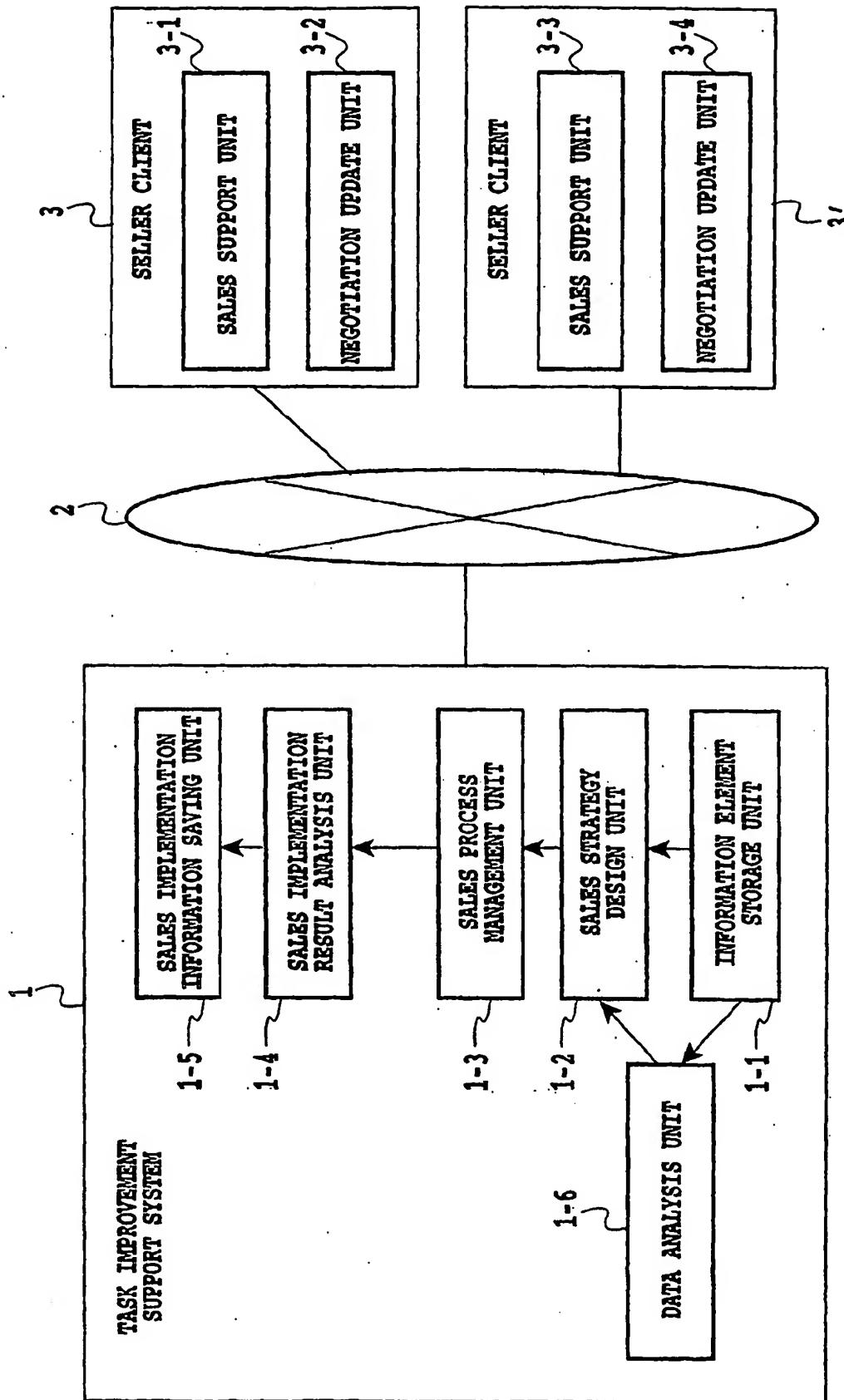


FIG.14

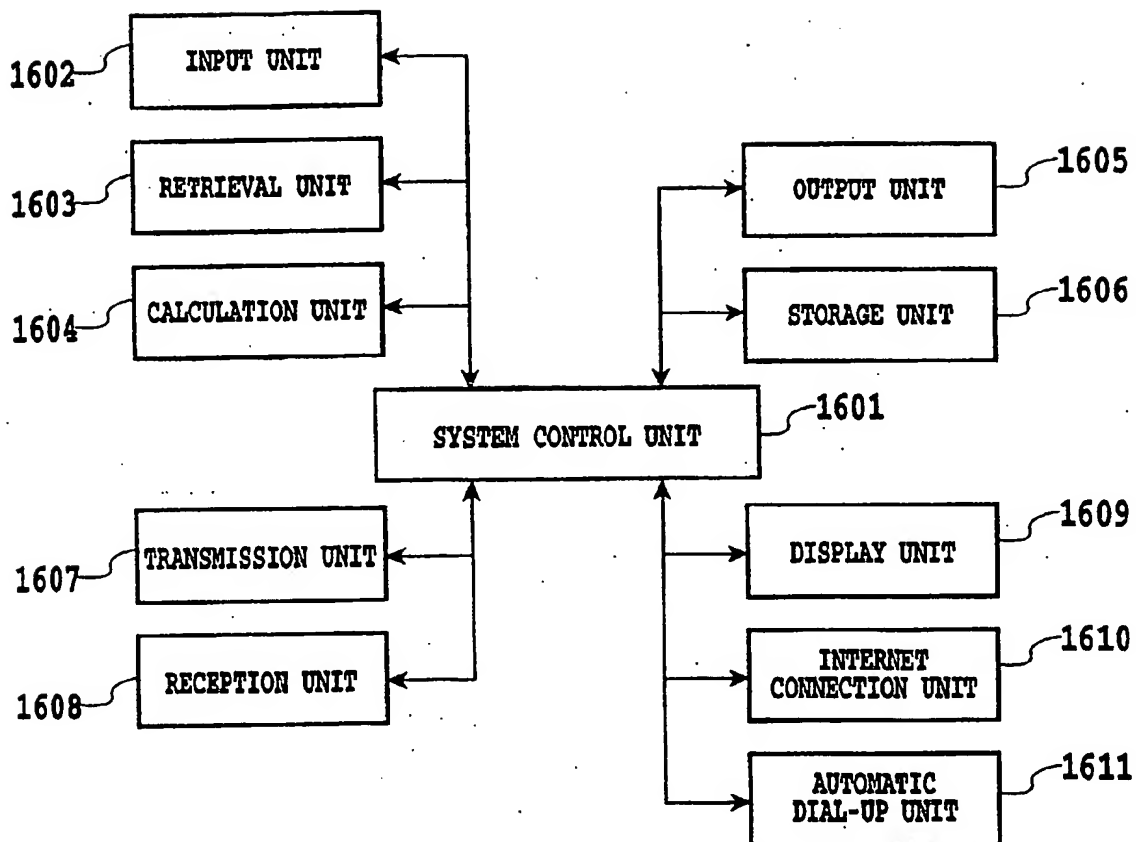
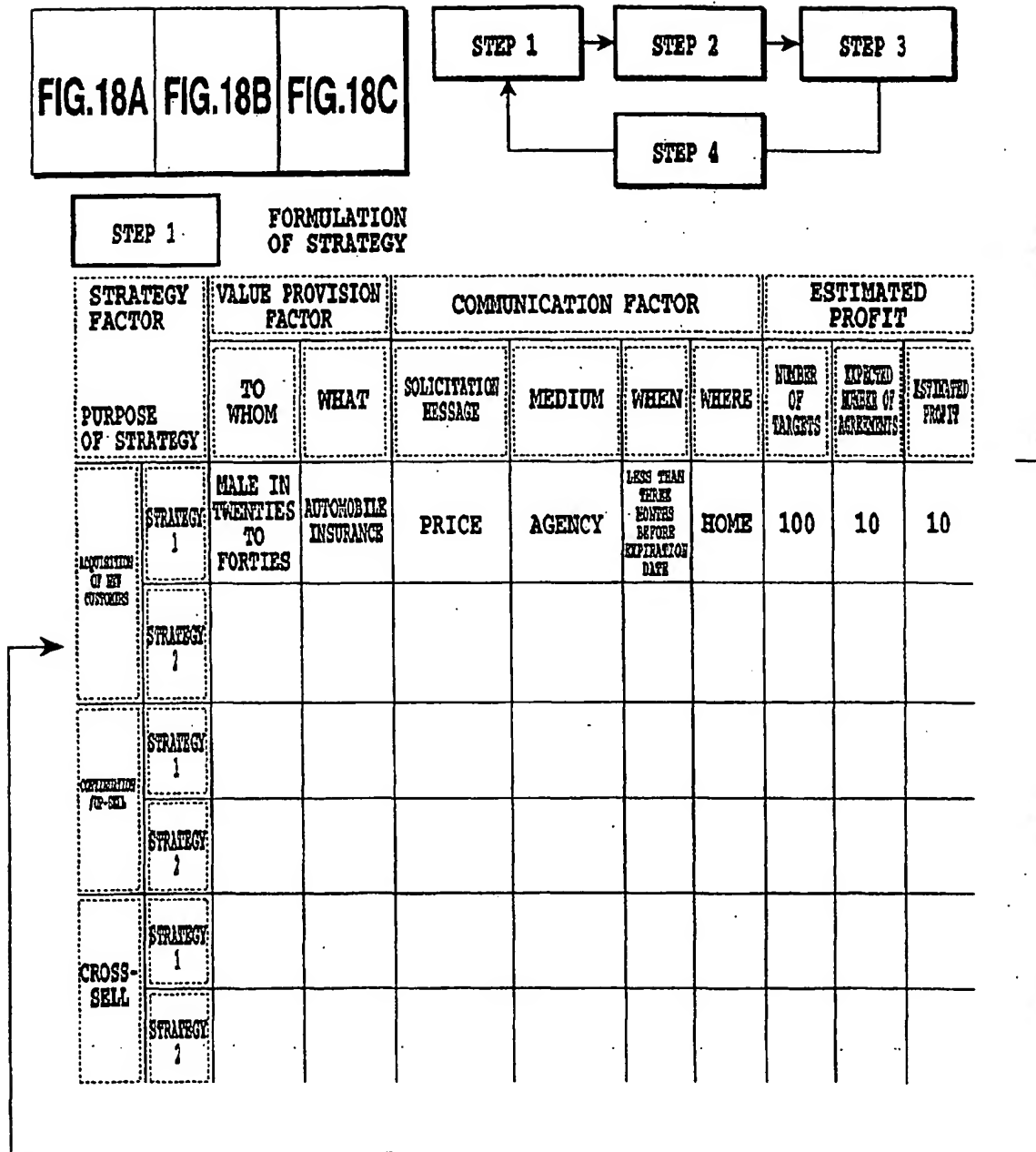
**FIG.16**

FIG.18



STEP 3

RESULT
ANALYSISPURPOSE OF
STRATEGY:ACQUISITION OF
NEW CUSTOMERS

WHAT

:AUTOMOBILE INSURANCE

→

STRATEGY ID.	VALUE PROVISION FACTOR			COMMUNICATION FACTOR						PROFIT		
	WHO	WHAT	SIZE : PERFORMANCE	COMMUNICATION MESSAGE	SIZE : PERFORMANCE	MEDIUM	WHEN	WHERE	SIZE : PERFORMANCE (MILLI COST PER ONE AGENT)	NUMBER OF TARGETS	NUMBER OF AGREEMENT	PROFIT
1-1	THIRTIES SUNNY	SAP	40%	ONLY PRICE	20%	ONLY AGENCY	ONE MONTH BEFORE EXPIRATION DATE	HOME	3,000YEN	10	2	3
1-2	THIRTIES SUNNY	PAP	30%	PRICE AND ROAD ASSISTANCE	50%	TELEPHONE + AGENCY	ONE MONTH BEFORE EXPIRATION DATE	HOME	1,250YEN	20	4	5
1-3	THIRTIES SUNNY	CONSUMER	20%	PRICE AND CARE	30%	DM ↓ AGENCY	TWO MONTH BEFORE EXPIRATION DATE	HOME	1,500YEN	30	2	3
1-4												

FIG.18C

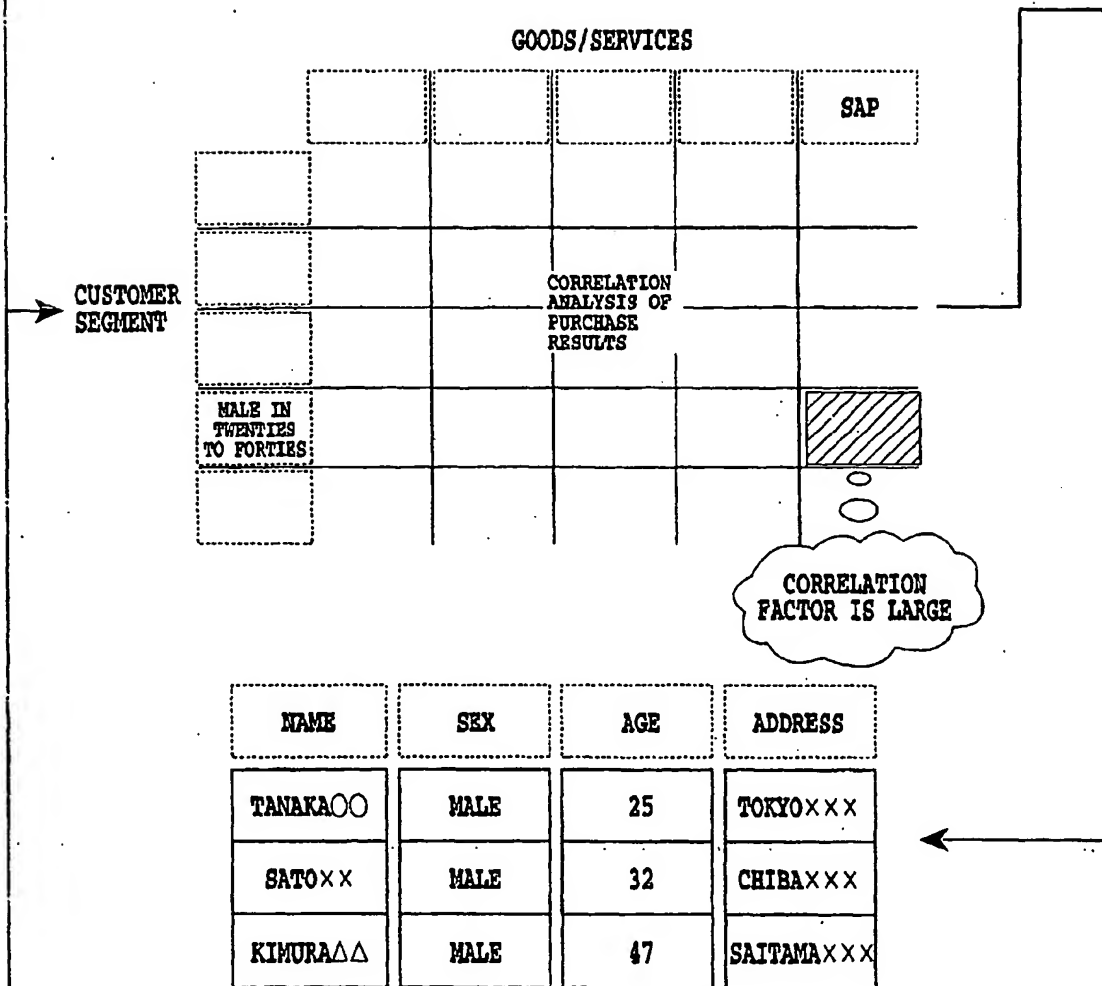


FIG.19B

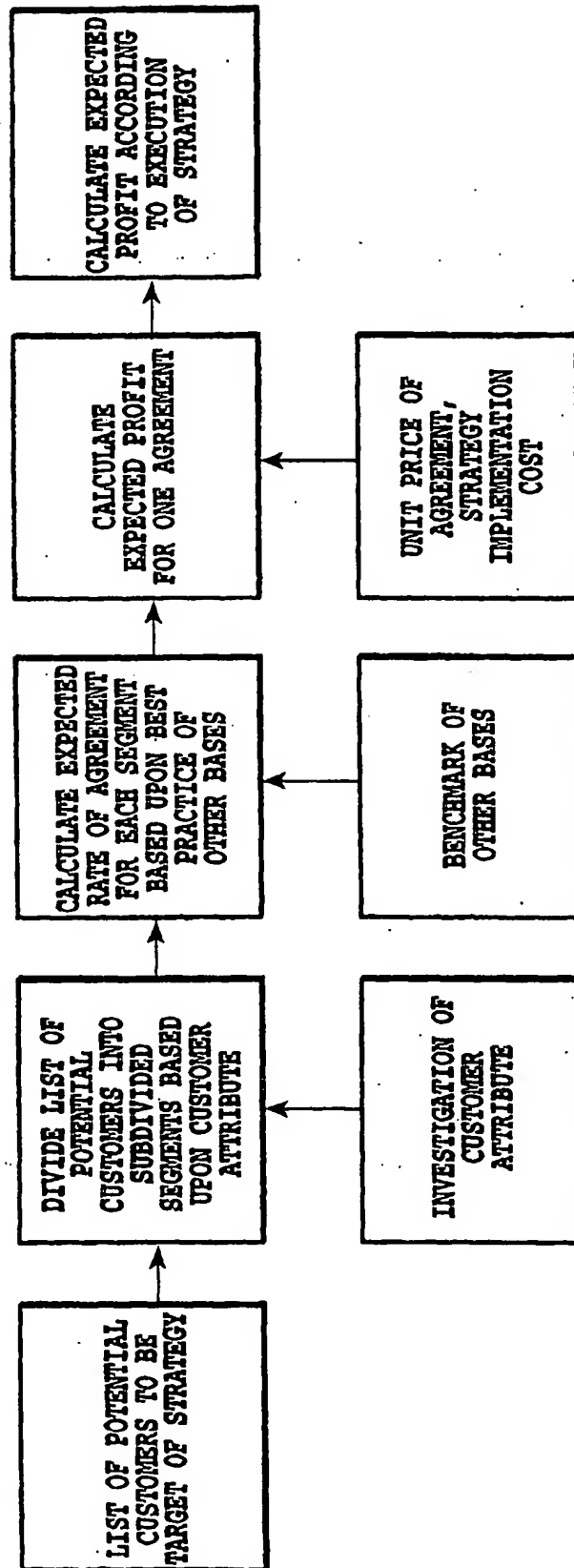


FIG.20

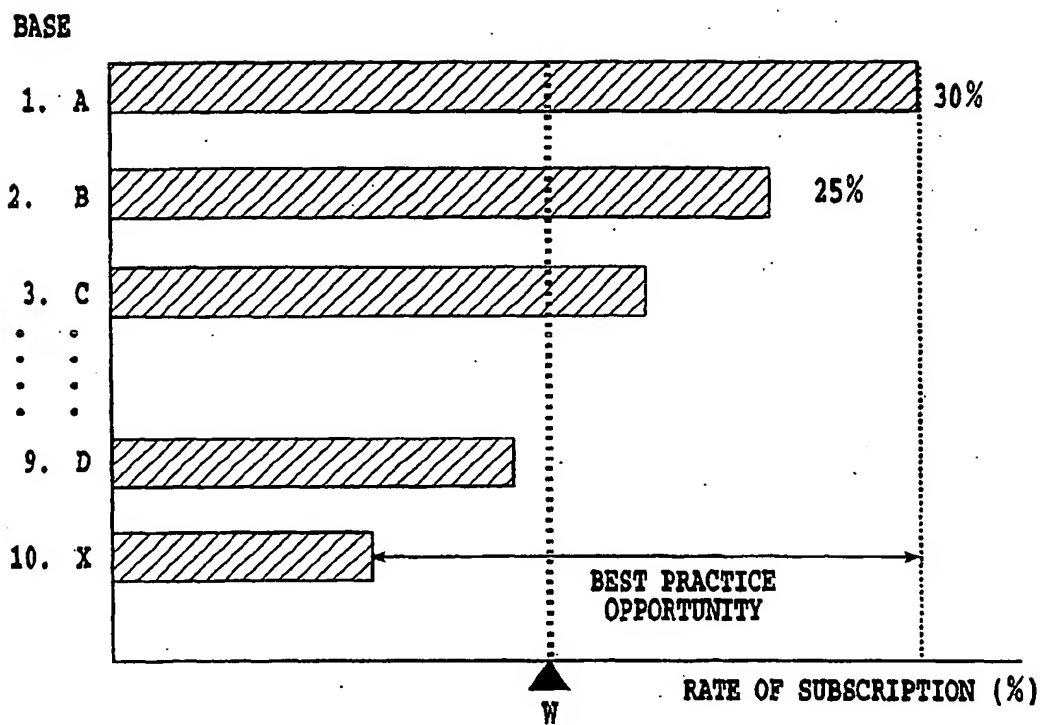


FIG.22

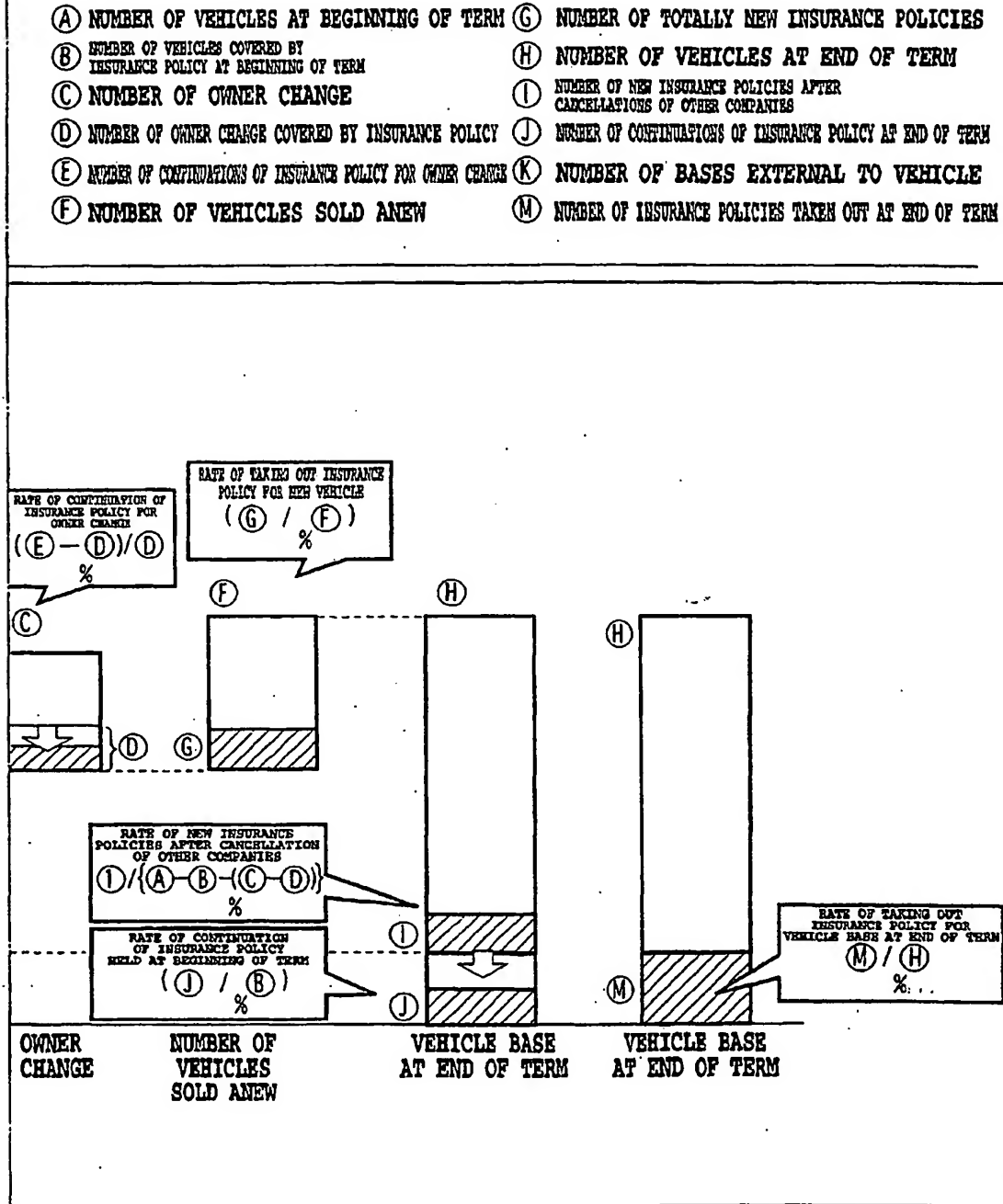


FIG.23B

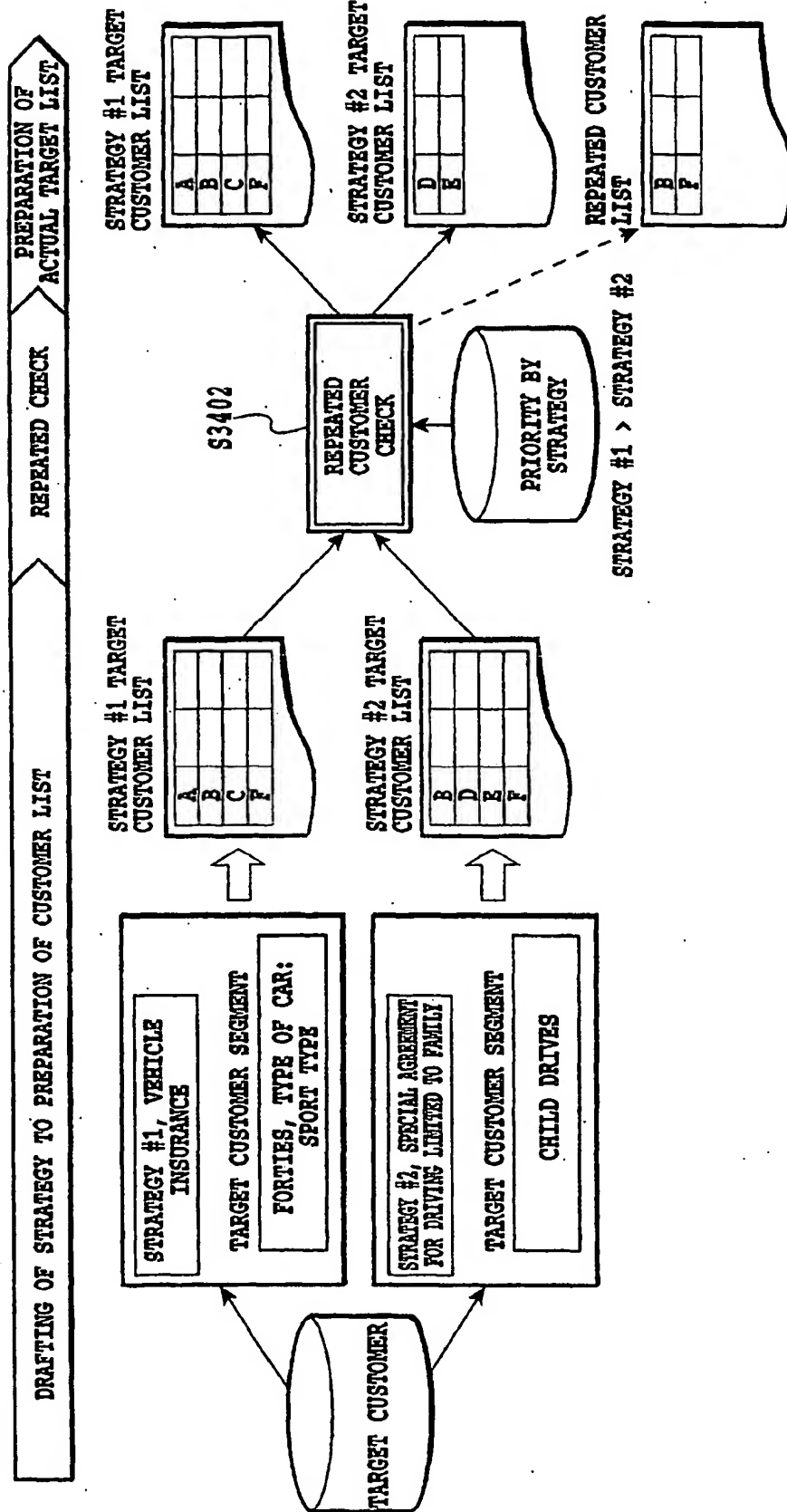


FIG.25

NAME	ADDRESS	TELEPHONE	AGE	SEX	INSUFFICIENT ITEM
○○○	TOKYO	03-5555-5555	25	-	SEX
×××	TOKYO	03-4444-4444	-	MALE	AGE
△△△	TOKYO	03-3333-3333	-	-	SEX/AGE

STRATEGY FACTOR	VALUE PROVISION FACTOR		COMMUNICATION FACTOR			
	TO WHOM	WHAT	SOLICITATION MESSAGE	MEDIUM	WHEN	WHERE
PURPOSE OF STRATEGY	STRATEGY 1	MALE IN TWENTIES TO FORTIES LIVING IN TOKYO	SAP	PRICE	AGENCY	THREE MONTHS BEFORE EXPIRATION DATE
	ACQUISITION OF TEN CUSTOMERS					HOME

FIG.26B

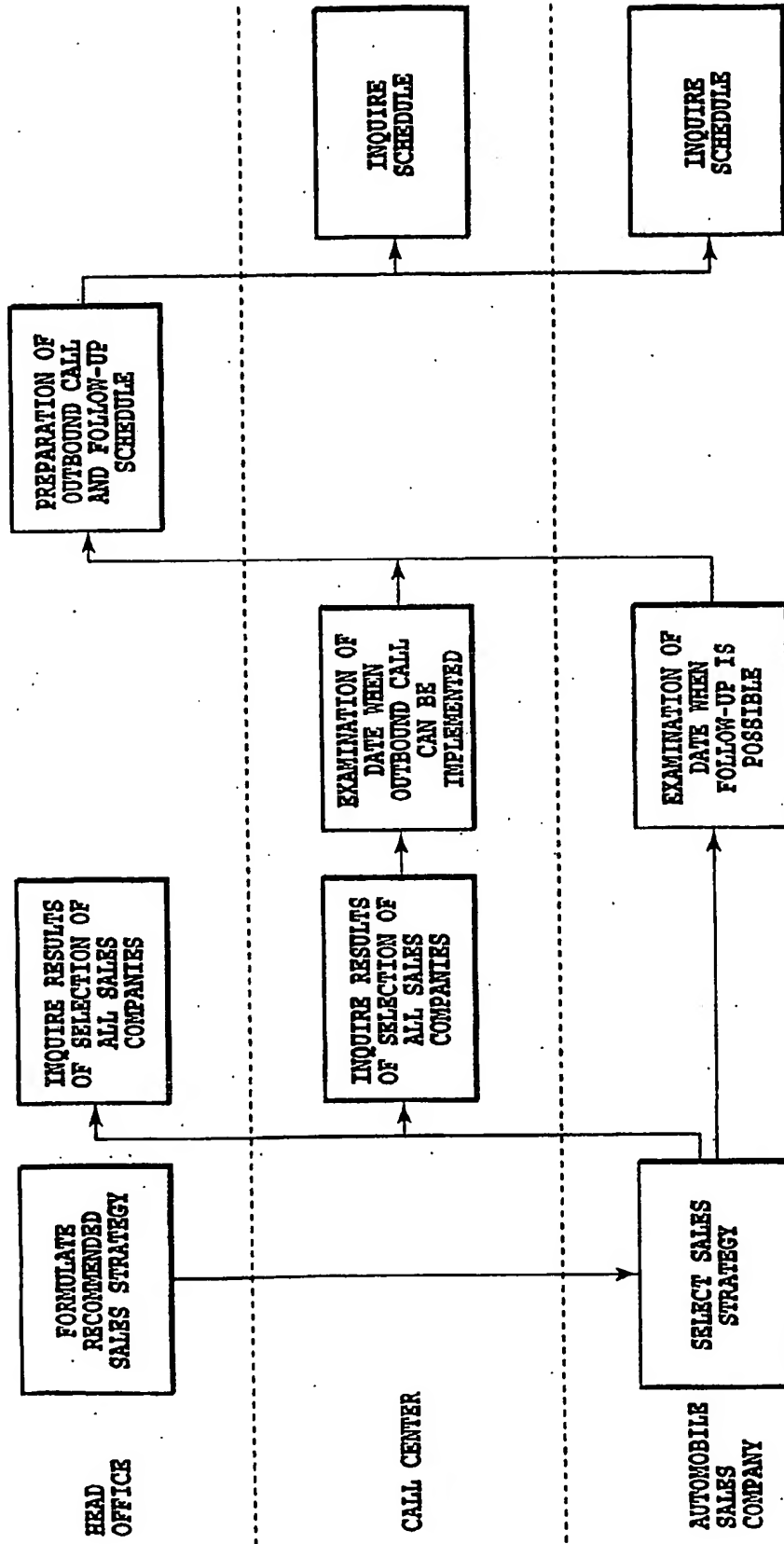


FIG.28

FIG.30

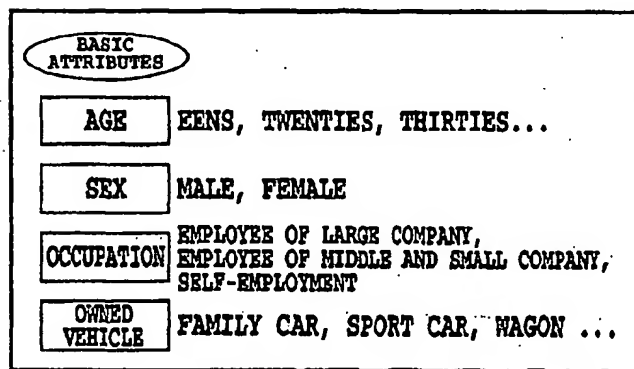
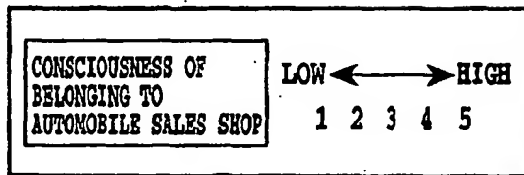
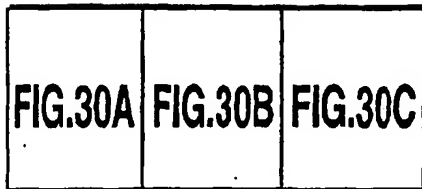


FIG.30A

STRATEGY FACTOR		VALUE PROVISION FACTOR		COMMUNICATION FACTOR				ESTIMATED PROFIT		
PURPOSE OF STRATEGY		TO WHOM	WHAT	SOLICITATION MESSAGE	MEDIUM	WHEN	WHERE			
ACQUIRE NEW CUSTOMERS	STRATEGY 1	→	AUTOMOBILE INSURANCE WITH SPECIAL ADVERTISING FOR PERSONAL TRAVEL							
	STRATEGY 2									
CONTINUE UP-SELL	STRATEGY 1									
	STRATEGY 2									
CROSS-SELL	STRATEGY 1									
	STRATEGY 2									

FIG.30C

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